# COLA Advisor Checklist

BEFORE advising season starts, confirm that you can access Banner (www.marshall.edu/banner/) and the Main Dean's Menu (see attached screen shot). If you have forgotten your Banner password, contact David Daniel (daniel6@marshall.edu) for a reset.

____ Provide the student with a Degree Evaluation Sheet/Program of Study (requirement sheet). Print this off from the COLA website or pick up a blank copy from the college office. The sheets are catalog-year specific. The student needs the degree sheet from the catalog year that they are under.

____ Ask the student for a copy of her/his tentative schedule for the upcoming semester. If the student has not prepared a schedule, ask him/her to do so using the schedule of courses available at www.marshall.edu/Registrar.

____ Using the 901 number, retrieve the student's record on BERT (https://mubert.marshall.edu/).

____ Look for the 60th hour line; check for D/F grades made within the first sixty hours. Those D/F grades marked "repeated" have been processed. Advise students of the D/F rule if they have unrepeated D/F grades.

____ Check the student's GPA in BERT. If it is less than 2.00, advise the student to call the COLA office (304.696.3263) to schedule an appointment with Cheryl Brown for an Academic Improvement Plan (AIP). The student should come to that meeting with a drop/add slip filled out with student's name, 901, and course selection.

____ Confirm that the student's tentative schedule contains classes needed for the degree. Access the student's DegreeWorks profile for information regarding classes still needed for the degree. (Caution: DegreeWorks is not always correct!)

____ Confirm that pre-requisites for the currently proposed classes have been met. Remind students that not every required course is offered every semester.

____ Confirm that co-requisites are present on the proposed schedule.

____ Confirm that classes are being taken in the correct sequence.

____ Advise freshmen and sophomores to start on the foreign language sequence.

____ Advise the student to call the COLA office (303.696.3263) to schedule an appointment for a junior and/or senior credit evaluation with Sara Green once they have completed the 58th and/or 90th credit hour.

____ Advise students who are scheduling for the final semester to schedule an appointment for a graduation review with Sara Green in the COLA office. (Student must pay the $50 graduation fee prior to the appointment.) The student will fill out a graduation application with Sara at this meeting.

____ Remove "advisor holds" from student's Banner account (see attached directions). If you have Banner access, but you cannot lift the hold, email Cheryl Brown (brownca@marshall.edu) to confirm that you have been granted permission to lift holds. If student has advisor holds from a different college in which they are not seeking a major, send the student's name and 901 to Cheryl Brown. Tell the student it may take a day or two to get that other hold lifted. Students seeking a second major from a different college will need to see their advisor from that college to remove the second hold.

How-to lift a registration hold

1. Log-in to MU Banner. http://www.marshall.edu/banner/
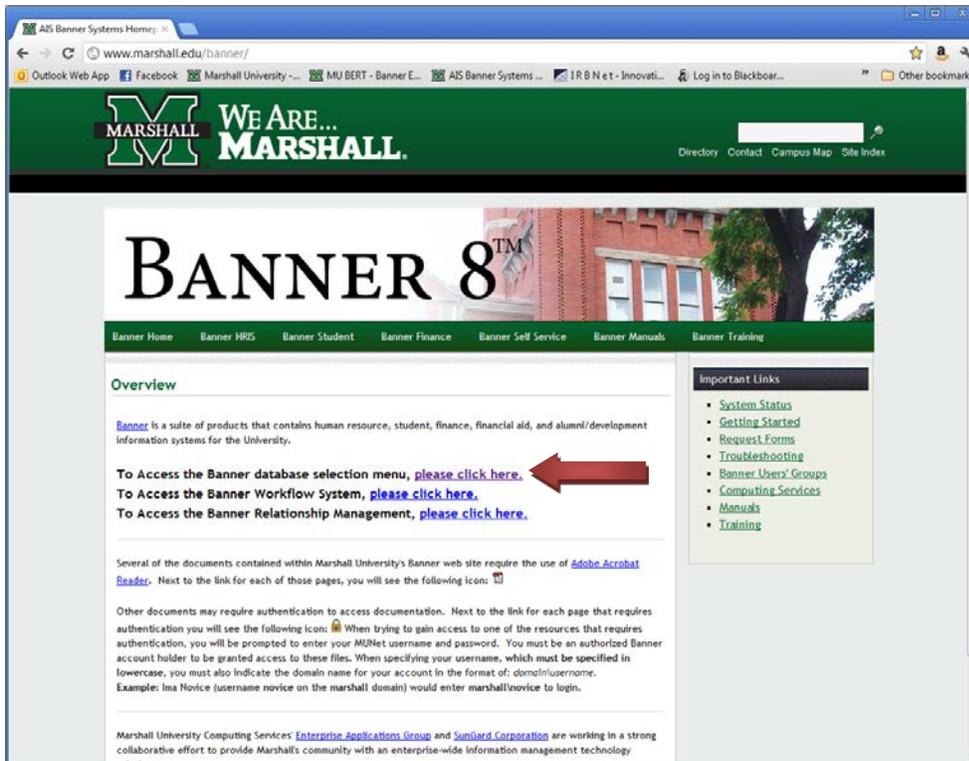
2. Choose MU Banner 8 Production. http://www.marshall.edu/banner/banner_links.asp
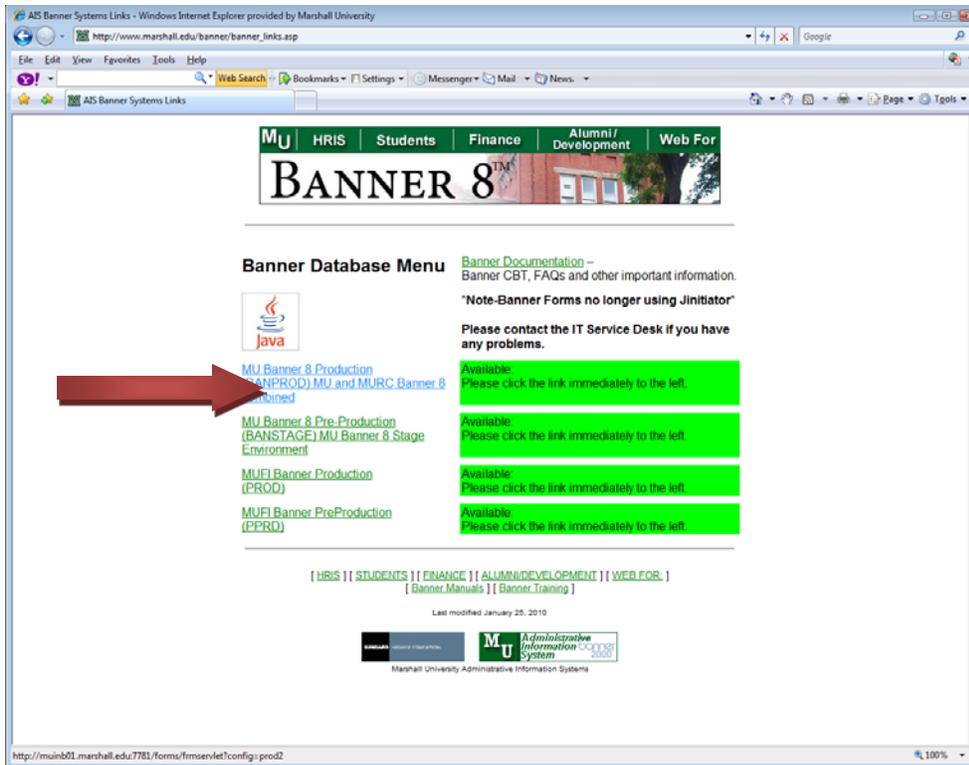
3. Choose Run. There will be two Oracle windows that open. Leave both of them open the entire time you are using Banner. You may see a security warning (see below). If you do, please choose "Run."

4. Enter your user name and password. If your email address is johndoe1@marshall.edu, your username would be johndoe1. Banner passwords expire frequently, so please make sure to update frequently.
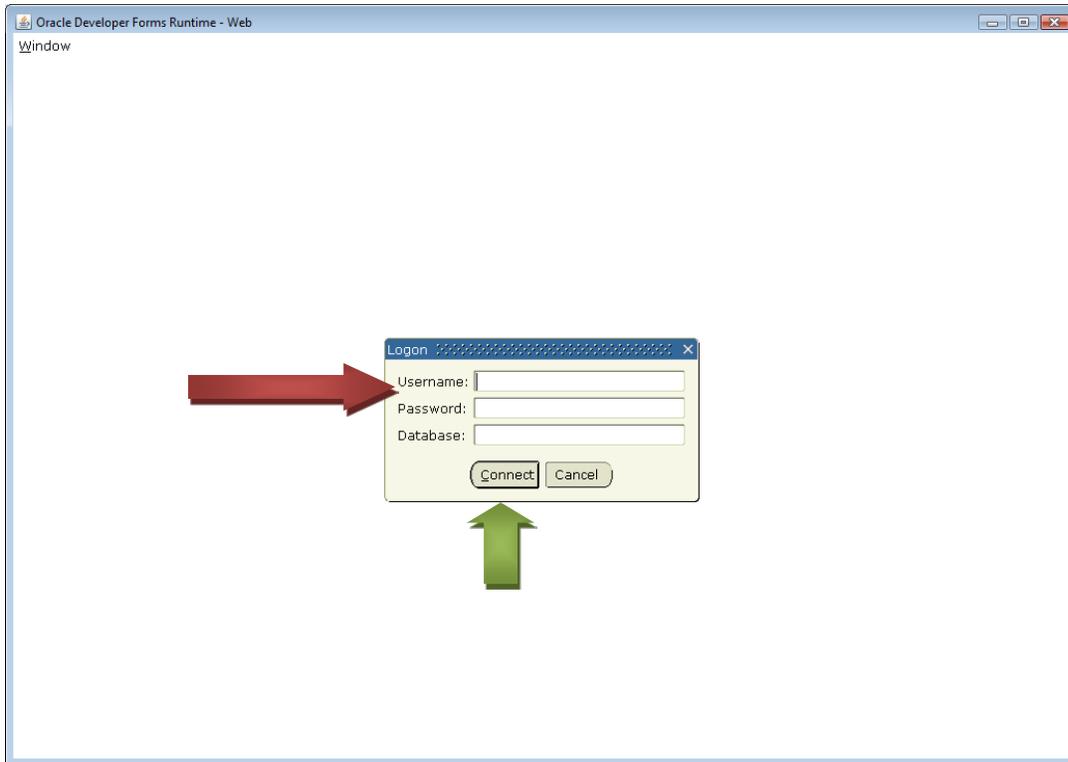

5. Once you enter you username and password, choose Connect.
6. You should now have access to your main Banner page.
7. On the main Banner page, choose Main Dean's Menu [*DEANS]
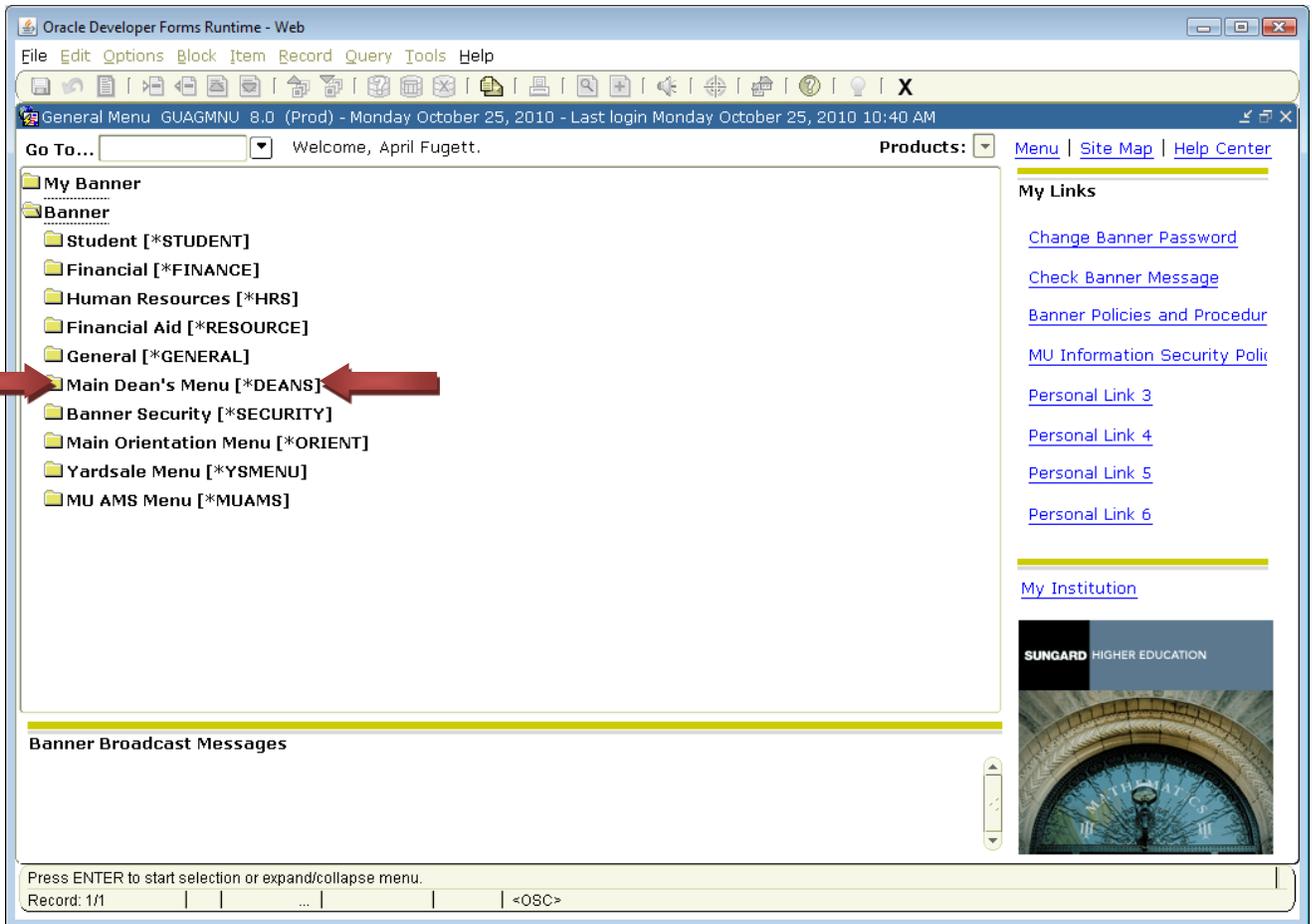
8. From the Main Dean's Menu, choose Hold Information [SOAHOLD].
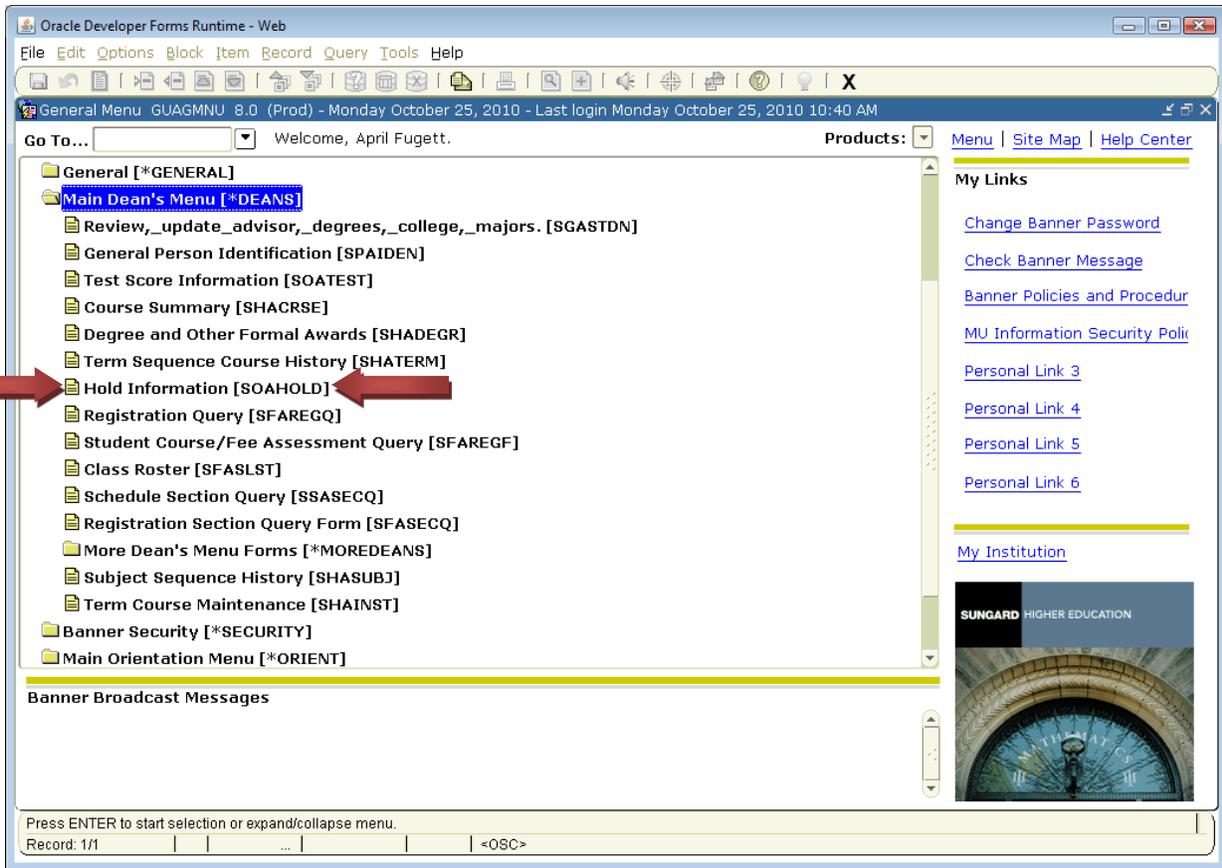
9. Type in the Student ID (901) number. Then click down on Hold Details. Any hold for that student will be listed along with the origination code. (Note: We can only remove holds that are Advisor Holds generated by CoLA.)
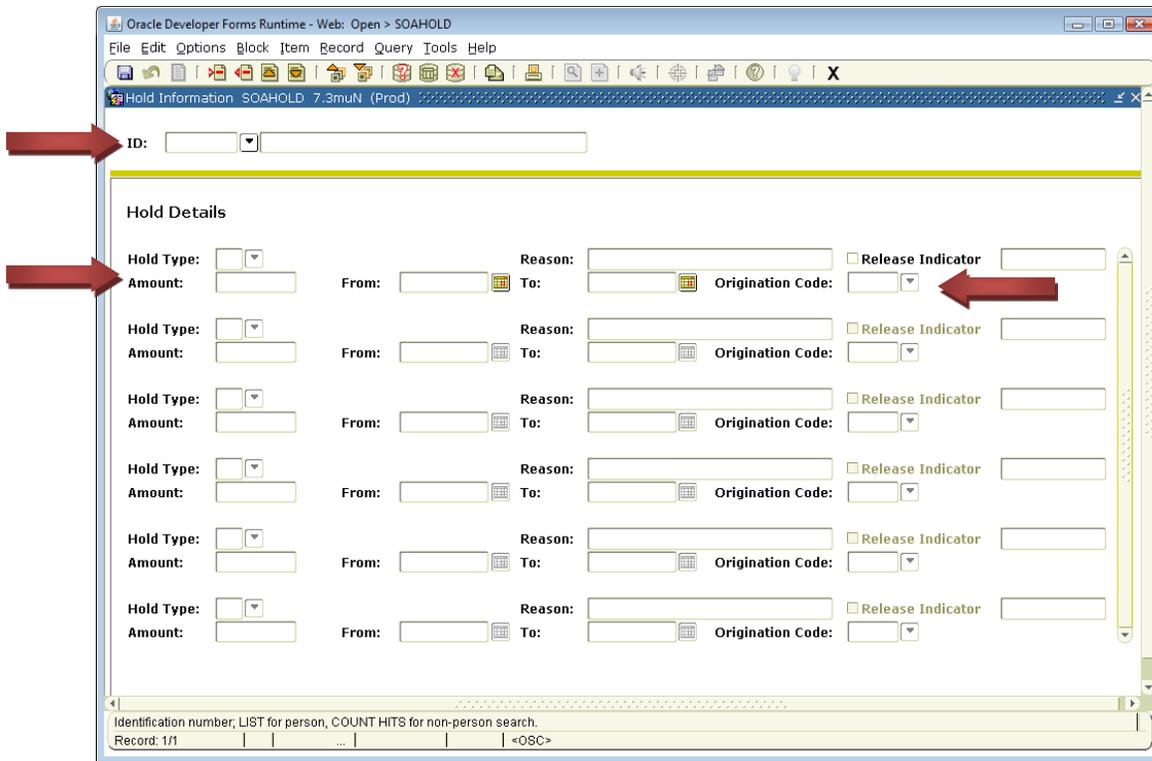
10. Choose the hold you want to remove. Click Remove Hold.
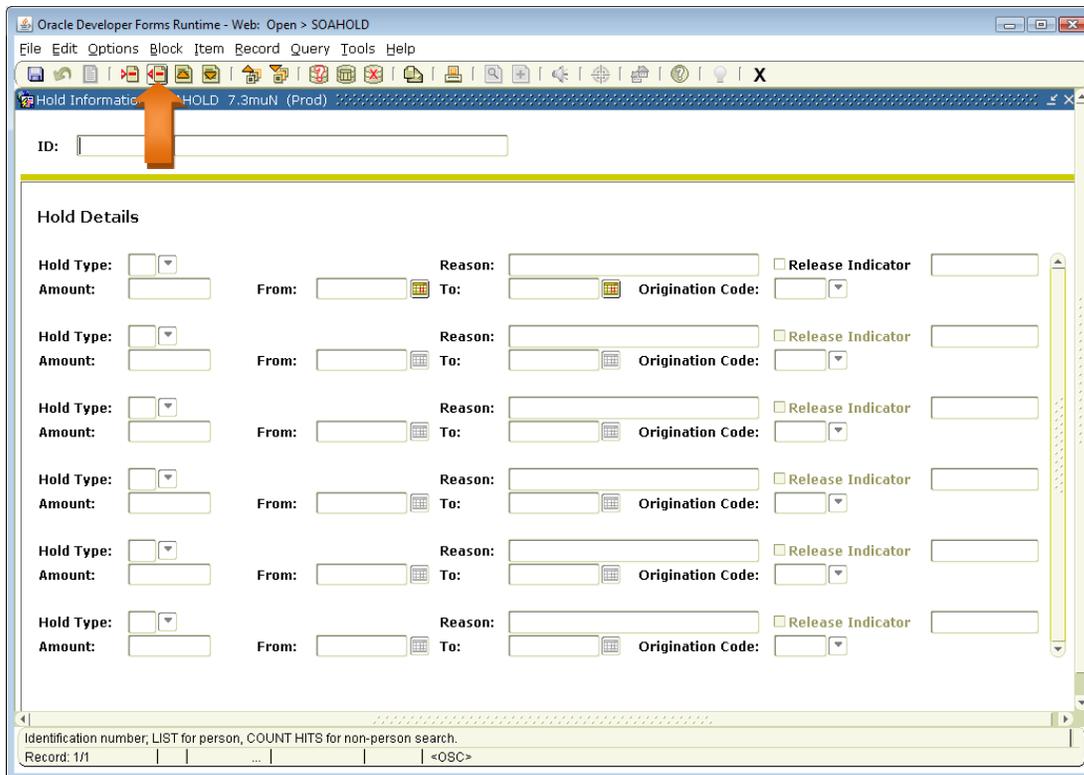
11. From the Menu tabs (File, Edit, Options, Block, Item, etc) choose File. From the drop-down menu, choose Save.
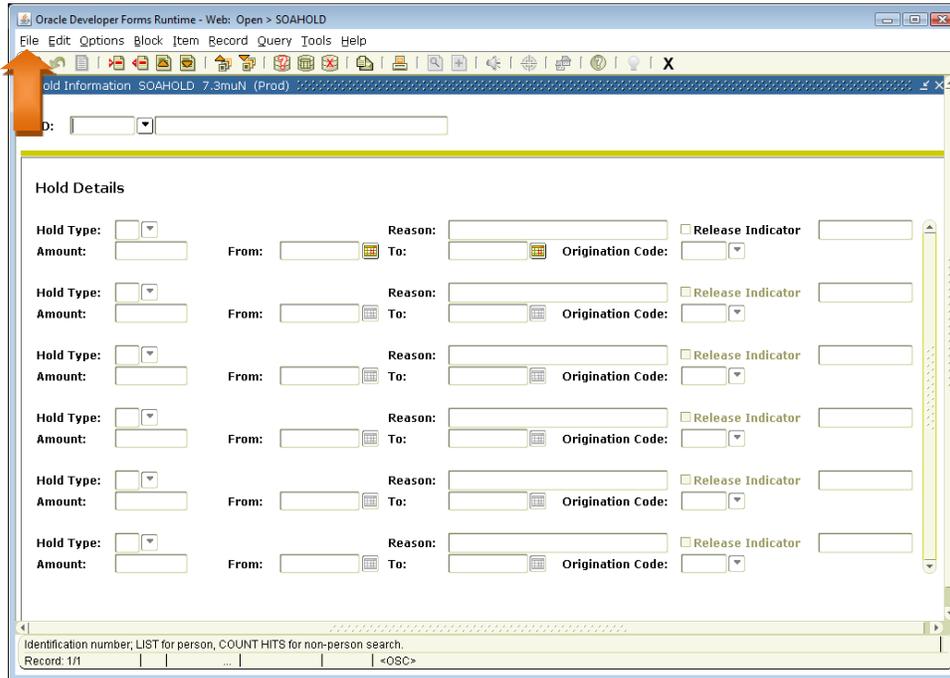
12. Repeat for all holds you need to lift.
13. When you are finished removing holds, choose File. From the drop-down menu, choose Exit. This will take you back to the main Banner window.
14. When you wish to exit Banner, choose File. From the drop-down menu, choose Exit. Banner will ask you if you are sure that you want to exit your session. Choose yes.
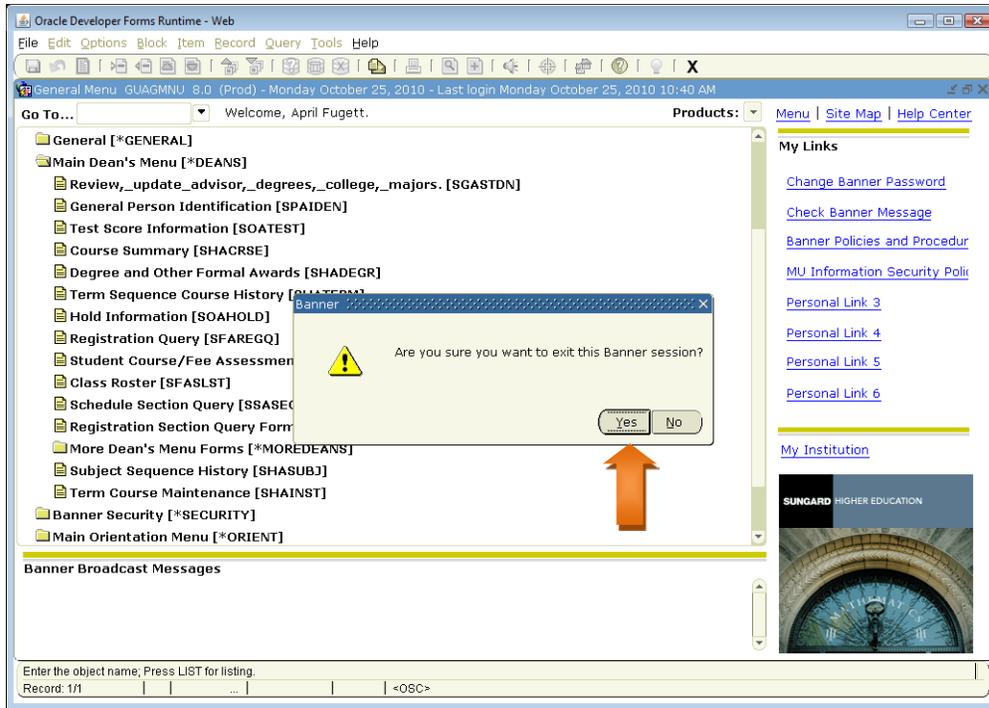
15. You have successfully exited Banner.